

# Come Together, Right Now, Over Me: a Story of ILL, Circulation and Our Patrons

Teva Sweet (AUU)  
&  
Alena Miller (OCLC)

# What we'll cover...

- Some background on AUU, WMS, and ILL
- Opportunity to forge new relationship within library
  - WorldShare® Circulation
  - Tipasa® for interlibrary loan
- Overview of ILL-Circ integration
- Before and after
  - Patron experience
  - Circulation and ILL staff experience
- Q&A

# Atlanta University Center Robert W. Woodruff Library AUU



# WorldShare<sup>®</sup> Management Services

## WorldShare Platform

### WORLDSHARE APPLICATIONS



#### **WorldShare Acquisitions**

Unified ordering and receiving of all library resources



#### **WorldShare Collection Manager**

Automation of electronic and physical collection workflows



#### **WorldShare Record Manager**

Record-at-a-time cataloging for physical and electronic resources



#### **WorldShare License Manager**

Management of all licensed electronic resources



#### **WorldCat Discovery**

Single search discovery of library resources for end users



#### **WorldShare Circulation**

Circulation and patron management



#### **WorldShare Interlibrary Loan**

Borrowing and lending management

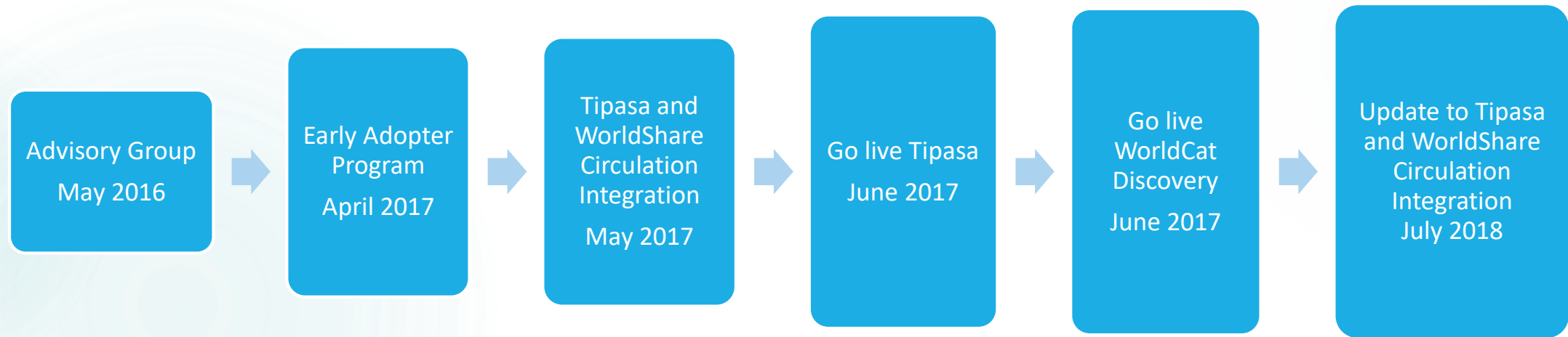


#### **WorldShare Reports**

Reports for acquisitions, circulation, cataloging/ collections and e-resources

Tipasa  
(optional)

# AUU History with Tipasa®







Assistant  
Director,  
Collections

Unit Head,  
ILL

ILL  
Assistant

Head, Discovery  
and Access  
Services

Unit Head,  
Circulation

Library  
Assistants

# Borrowing integration

**Tipasa<sup>®</sup>**

 WorldShare<sup>®</sup> **Circulation**

Received



Create temp item + place hold

Returned



Check in

---

Shipped



Assess patron bill



# Lending integration

**Tipasa<sup>®</sup>**

Shipped

Completed



 **WorldShare<sup>®</sup> Circulation**


Check out

Check in

# Patrons' experience

Before	After
<ul style="list-style-type: none"><li>• Circulation items in My Library account in WMS</li><li>• ILL items in ILLiad patron account</li><li>• Different username and password for ILLiad</li></ul>	<ul style="list-style-type: none"><li>• Circulation and ILL items in My Library account in WMS</li><li>• My ILL Requests (Tipasa patron portal) – needed primarily for renewals</li><li>• Single username and password</li><li>• Easy to move among My Library, My ILL Requests, and My Lists (saved using WorldCat Discovery)</li></ul>

# ILL & Circ in My Library Account

 Atlanta University Center  
Robert W. Woodruff Library

Q

Library Links ▾

Teva ▾

Advanced Search

Course Reserves

Saved Searches

Chat with a librarian

## My Library Account


Contact Information [View](#)

2 Checkouts | 0 Overdue - \$0.00

0 Holds


0 Charges

Sort by: Due Date ▾

	Status	Due Date	Charges
1	<a href="#">A brief history of seven killings : a novel</a> by <a href="#">Marlon James</a>  Print book 2014 OCLC Number: 871192481 Database: WorldCat	<a href="#">Renew</a>	11/30/18 11:59:59 PM \$0.00
2	<a href="#">The Spanish American revolutions, 1808-1826.</a> by <a href="#">Lynch, John</a> ; <a href="#">James H. Sutton Jr.</a> and <a href="#">Sylvia Leal Carvajal</a> <a href="#">Collection.</a>	<a href="#">Renew</a>	The item has reached its renewal limit.

# No username/password fatigue

Atlanta University Center Robert W. Woodruff Library



Atlanta University Center  
Robert W. Woodruff Library


Sign in

Library barcode

Password




[Set/reset password](#)

# Access circulation account from ILL account



Atlanta University Center  
Robert W. Woodruff Library

Library Links ▾Teva ▾







My Account   
Import My Lists   
My Personal Lists   
Sign Out

Account Details - Teva

Interlibrary Loan Requests53 Requests

Create Request

Sort by: Most Recent  
Viewing all requests (up to 500)

Request ID	Title	Status	Pickup Location
<a href="#">191467575</a>	Library journal. Placements and Salaries 2018 by Suzie Allard  Periodical/Article	In transit	
<a href="#">191037353</a>	The Spanish American revolutions, 1808-1826. by Lynch, John; James H. Sutton Jr. and Sylvia Leal Carvajal Collection.  Book	Due 12/16/18	 Renew
<a href="#">191034146</a>	Origin : a novel by Brown, Dan  Book	Canceled	
<a href="#">191033788</a>	Origin / by Dan Brown  Book	Canceled	
<a href="#">189987299</a>	Bellman & Black / by Diane Setterfield  Book	Canceled	AUC Woodruff Library Information Desk



# Circ and ILL processes

Process	Before	After
Receipt of borrowed item	<ul style="list-style-type: none"><li>• ILL staff marked as received in ILLiad</li><li>• Item placed at Circ desk</li></ul>	<ul style="list-style-type: none"><li>• ILL staff marked as received in Tipasa</li><li>• Item placed at Circ desk</li></ul>
Checkout ILL item to patron	<ul style="list-style-type: none"><li>• Item considered as automatically checked out to patron</li><li>• Circ staff checked ID and handed item to patron; not checked out in Circ; no sign-out sheets</li></ul>	<ul style="list-style-type: none"><li>• Circ staff check out in WorldShare Circulation</li></ul>

# ILL staff new workflow

## Receipt of borrowed item

**191077760: Biblical counseling to the military : the book of Joshua as a model**

### Did you receive this item?

Date received:

11/01/2018



Options:

☒ Print Book Straps/Stickers

Temporary Barcode:

191077760

Mark as received

Not Received

# Circulation staff new workflow

## Checkout ILL item to patron

The screenshot displays the WMS Circulation interface. At the top, there are tabs for Metadata, Acquisitions, Circulation, Interlibrary Loan, Analytics, and Admin. The 'Circulation' tab is active. On the left, there is a sidebar with 'Assist Patrons' and a search bar. The main area shows the patron's information: Teva Hutchinson (23049000901967). Below this, there are tabs for Checkout, Holds, Bills, and Profile. The 'Checkout' tab is selected. The 'Account Overview' section shows the patron's type (RWWL Staff), home branch (Main), expiration date (05/25/2025 12:00:00 AM), and last activity (05/09/2017 11:38:51 AM). Below this, there are statistics: 0 of 1 items overdue, \$0.00 outstanding bills, and 0 of 0 holds ready to pickup. The 'Enter barcode' section has a barcode input field and a 'Go' button. Below this, there is a 'Due Before Date' field. The 'Items' table shows one item with the following details:

Format	Title	Call Number	Barcode	Enumeration	Check Out Date	Due Date	Renewal Count
	The John F. Slater Fund: a nineteenth century affirmative action for Negro education / Fisher, John E.,	LC 2707.F57 1986 \$23.00	33049001786852		05/09/2017 11:38:51 AM	06/06/2017 11:59:59 PM	0

At the bottom, there are buttons for 'Renew', 'Change Due Date', 'Change Status', and 'Print'. The 'Change Due Date' button is highlighted in yellow. The status bar at the bottom indicates '1 item selected'.

1. Locate the patron in WMS Circulation.
2. Check the Interlibrary loan item out to patron using the barcode on the **front** of the book. The barcode may be on a book band or a label on the book.
3. The Circulation system will automatically provide a due date but it will not be correct because each library decides on a different loan period, resulting in a different due date. Please change the due date to match the due date written/stamped on the front of the book.
4. When the item is returned to the Circulation desk, please check it in, using the barcode on the front of the item.


# Circ and ILL processes (continued)

Process	Before	After
Items not picked up?	<ul style="list-style-type: none"><li>• ILL staff visited Circ desk to check</li></ul>	<ul style="list-style-type: none"><li>• ILL staff can check in WorldShare Circulation if item was picked up</li></ul>
Missing item	<ul style="list-style-type: none"><li>• No way to check whether patron picked up item</li><li>• Circ staff directed all ILL questions to ILL staff</li></ul>	<ul style="list-style-type: none"><li>• Circ staff can see ILL items checked out by patron</li></ul>
Overdue items	<ul style="list-style-type: none"><li>• With no formal checkout process, Circ staff sometimes handed overdue item to patron</li></ul>	<ul style="list-style-type: none"><li>• Circ staff alerted if item is overdue</li><li>• Circ staff can block patron for both Circulation and ILL</li></ul>

# Items picked up?


## Temporary Item: The Spanish American revolutions, 1808-1826.

### Item Details

<b>Status</b>	On Loan <a href="#">Sweet, Teva</a> <i>Atlanta University Center, Robert W. Woodruff Library</i>
	<b>WorldShare</b> Request 191037353 <i>Supplied by Georgia Institute of Technology</i>
<b>Owning Institution</b>	Georgia Institute of Technology
<b>Holding Location</b>	Unknown Holding Location: WSIL
<b>Shelving Location</b>	<b>Permanent</b> Unknown Shelving Location: WS-ILL
	<b>Temporary</b>
<b>Title</b>	The Spanish American revolutions, 1808-1826.
<b>Description of Item</b>	
<b>Author</b>	Lynch, John; James H. Sutton Jr. and Sylvia Leal Carvajal Collection.
<b>Material Format</b>	 Book
<b>Language</b>	

## Temporary Item: Dictionary of Caribbean and Afro-Latin American biography /

### Item Details

<b>Status</b>	On Hold <a href="#">Jackson, Tisa</a> <i>Atlanta University Center, Robert W. Woodruff Library</i>
	<b>WorldShare</b> Request 190656989 <i>Supplied by Rollins College</i>
<b>Owning Institution</b>	Rollins College
<b>Holding Location</b>	Unknown Holding Location: WSIL
<b>Shelving Location</b>	<b>Permanent</b> Unknown Shelving Location: WS-ILL
	<b>Temporary</b>
<b>Title</b>	Dictionary of Caribbean and Afro-Latin American biography /
<b>Description of Item</b>	
<b>Author</b>	Franklin W Knight; Henry Louis Gates
<b>Material Format</b>	 Book



# Checked out ILL items now visible to Circ staff

**Teva Sweet (23049000901967)**

Checkout

Holds

Bills

Profile

▼ Account Overview

**Patron Type** RWWL Staff

**Expiration Date** 05/25/2025 12:00:00 AM

**Home Branch** WS ILL (Atlanta University Center, Robert W. Woodruff Library)

**Last Activity** 11/12/2018 12:56:24 PM


0 of 2 items overdue

[\\$0.00](#) outstanding bills

[0 of 0 holds](#) ready to pickup

Enter barcode  

Go



[Set 'Due Date'](#) 

[Refresh](#) Results 1-2 of 2 Show 

10 ▼

 rows per page

<< First < Previous **1** Next > Last >>

<input type="checkbox"/>	Format ▼	Title ▼	Call Number ▼	Barcode ▼	Enumeration	Check Out Date ▼	Due Date ▼	Renewal Count ▼
<input type="checkbox"/>		<a href="#">A brief history of seven killings : a novel / James, Marlon,</a>	PR9265.9.J358 B75 2014	<a href="#">33049008401232</a>		11/02/2018 10:39:10 AM	11/30/2018 11:59:59 PM	0
<input type="checkbox"/>		The Spanish American revolutions, 1808-1826. / <i>Lynch, John; James H. Sutton Jr. and Sylvia Leal Carvajal Collection.</i> <small>Temporary item</small> <b>WorldShare</b>		<b>191037353</b>		10/19/2018 3:28:17 PM	02/16/2019 11:59:59 PM	0

[Refresh](#) Results 1-2 of 2 Show 

10 ▼

 rows per page

<< First < Previous **1** Next > Last >>

Renew ▼

Change Due Date

Change Status

Print ▼

▼

# Circ and ILL processes (continued)

Process	Before	After
Billing for lost books	<ul style="list-style-type: none"><li>• Bill tracked in Circ</li><li>• Bill also tracked in ILLiad</li><li>• Needed to delete both when fine paid or item(s) returned</li></ul>	<ul style="list-style-type: none"><li>• ILL staff place billing info in WMS (single patron account)</li></ul>
Blocking patron (e.g., to prevent graduation clearance)	<ul style="list-style-type: none"><li>• ILL staff blocked in ILLiad <b>and</b> placed note in WMS</li><li>• Circ staff blocked in WMS</li></ul>	<ul style="list-style-type: none"><li>• Patron account blocked for both Circ and ILL in WMS</li></ul>

# ILL Billing info in WMS

Checkout

Holds

Bills

Profile

▼ Account (\$50.00 outstanding)

Create Bill

[Refresh](#)

Results 1-1 of 1

Show

10 ▼

rows per page

<< First < Previous 1 Next > Last >>

☐

Reason

Description

Barcode

Call Number

Due Date

Date Billed

Amount

Outstanding

☐

ILL Replacement & Processing

11/06/2018 2:36:47 PM

\$50.00

\$50.00

[Edit](#)

[Details](#)

[Refresh](#)

Results 1-1 of 1

Show

10 ▼

rows per page

<< First < Previous 1 Next > Last >>

Pay/Waive/Refund

Current charges

\$50.00

Total accruing charges

\$0.00

Current outstanding charges

\$50.00

# Circulation staff blocks patrons

Metadata	Acquisitions	Circulation	Interlibrary Loan	Analytics	Admin
<div>State/Province <input type="text" value="GA"/></div> <div>Postal Code <input type="text" value="30314"/></div> <div>Type <input type="text" value="Home"/> <input type="radio"/> Primary <input type="checkbox"/> Invalid</div> <div>Country <input type="text"/></div> <div>Address 1 <input type="text"/></div> <div>Address 2 <input type="text"/></div> <div>City <input type="text"/></div> <div>State/Province <input type="text"/></div> <div>Postal Code <input type="text"/></div>			<div>Type <input type="text" value="Home"/> <input type="radio"/> Primary <input type="checkbox"/> Invalid</div> <div>Address <input type="text"/></div>		
<div><b>Circulation</b></div> <div>Barcode * <input type="text" value="0000000000"/></div> <div>Patron Type * <input type="text" value="RWWL Staff"/></div> <div>Registration Date <input type="text" value="11/03/2015"/></div> <div>Home Branch * <input type="text" value="WS ILL"/></div> <div>ID Verified <input checked="" type="checkbox"/></div> <div><b>Blocked</b> <input checked="" type="checkbox"/></div> <div>Collection Exempt <input type="checkbox"/></div>					
<div><b>Interlibrary Loan</b></div> <div>Identifier <input type="text" value="0000000000"/></div> <div>Patron Type <input type="text" value="RWWL Staff"/></div> <div>Pickup Location <input type="text"/></div> <div>Approved? <input type="checkbox"/></div> <div><b>Blocked?</b> <input checked="" type="checkbox"/></div>					
<div><b>Delivery Notification</b></div> <div><b>SMS Messaging / Telephone</b></div> <div>Number <input type="text"/></div> <div>Email <input type="text" value="thutchinson@aucr.edu"/></div> <div>Send Updates? <input checked="" type="checkbox"/></div> <div>Send Email Updates? <input checked="" type="checkbox"/></div> <div>Send SMS Updates? <input checked="" type="checkbox"/></div>					

# Looking back

- Don't be afraid to make changes when you begin a new position. Often times you are expected to make new changes.
- Reach out to OCLC for help if needed.
- Reach out to fellow ILLers for help when necessary. I reached out to people I had never had contact with before like Tulsa Community College who shared their integration setup and workflow with me when I was having some complications with the integration.



# Looking forward

- Bulk deletion of patron records available for both Tipasa and WMS.
- Improvements to renewal process for patrons.
- Tighter integration between My Account and My ILL Requests.
- In 2019 AUC RWWL will conduct a survey assessing our patron's perception of the ILL service we provide and we expect that the change in systems will be addressed by some of our patrons who have used both ILLiad and Tipasa.
- Cross unit meetings?

# Quotes

- Circulation Staff, “Now we can both see the changes made to a patron’s account in one place! Finally!”
- Circulation Staff, “It helps that I am able to tell patrons which books are overdue for ILL rather than telling them to log into their ILLiad accounts. I feel more helpful.”
- ILL Staff, “Being dependent on another unit(‘s patron database) comes with challenges but we have been working together unlike when we used ILLiad.”
- Circulation Staff, “The only thing that I have(*sic*) is changing the due date but that has been worked out. Secondly, the ILL staff is always available to assist circulation when a problem arrives.

# QUESTIONS?

Alena Miller

[millera@oclc.org](mailto:millera@oclc.org)

Teva Sweet

[thutchinson@auctr.edu](mailto:thutchinson@auctr.edu)